DOCUMENT RESUME

ED 190 136 IR 008 653

AUTHOR Van Toll, Faith; McNamara, Mary E.
TITLE Accountability in a Regional Medical Library Consultant/Extension Program: The Evolution of Documentation Procedures.
INSTITUTION Kentucky, Ohio, Michigan Regional Medical Library, Detroit, Mich.
SPONS AGENCY National Library of Medicine (DHEW), Bethesda, Md.
PUB DATE Mar 80
CONTRACT NIH-71-4711
NOTE 55p.

EDRS PRICE MF01/PC03 Plus Postage.
DESCRIPTORS Accountability; *Consultation Programs; Data Collection; *Documentation; Interlibrary Loans; Library Extension; *Library Networks; Library Services; *Medical Libraries; *Methods; Program Evaluation; Records (Forms); Regional Programs

ABSTRACT

This report outlines the development of the Kentucky-Ohio-Michigan Regional Medical Library (KOMRML), a library network providing interlibrary loan services, MEDLARS services, reference services, consultation programs, and continuing education programs to its tri-state region. Special emphasis is given to KOMRML's extension program to encourage interactive hospital participation in the network, and to its development of documentation methods which demonstrate the accountability of its consultant program. Appendices include samples of the various log forms used, procedural outlines, expenditure forms, annual report forms, and an extramural activities glossary. (FM)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

U S DEPARTMENT OF HEALTH, EDUCATION & WELFARE
NATIONAL INSTITUTE OF EDUCATION

THIS DOCUMENT HAS BEEN REPRODUCED EXACTLY AS RECEIVED FROM THE PERSON OR ORGANIZATION ORIGINATING IT. POINTS OF VIEW OR OPINIONS STATED DO NOT NECESSARILY REPRESENT OFFICIAL NATIONAL INSTITUTE OF EDUCATION POSITION OR POLICY

KOM /// kentucky ohio michigan regional medical library network

ED190136

Papers and Reports, No. 17

Accountability In A Regional Medical Library Consultant/Extension Program: The Evolution Of Documentation Procedures*

By

Faith Van Toll

&

Mary E. McNamara

*This publication is produced through financial support under Contract NO. NIH 71-4711
National Library of Medicine, National Institutes of Health, Department of Health, Education and Welfare

March 1980

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY
Faith Van Toll

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

IR008653

INTRODUCTION

In the 1960's the state of the nation's health became a concern of such magnitude that in 1964 President Lyndon B. Johnson created a Commission on Heart Disease, Cancer and Stroke to "...recommend steps to reduce the incidence of these diseases through new knowledge and more complete utilization of the medical knowledge we already have..."(1) Inherent in the charge was the understanding that a primary reason for the prior inability of the nation's physicians and other health care professionals to minimize these diseases was the unavailability of biomedical information at the patient care level. In addressing this information issue the Commission recommended that:

> ...The National Library of Medicine be authorized and adequately supported to serve its logical and necessary function as the primary source for strengthening the nation's medical library system.(2)

The Commission further recommended that NLM coordinate the development of a national network of medical library services including:

> ...1. A carefully developed plan for the United States providing an equality of library access for health workers in all states. 2. A system or series of cooperative agreements between the National Library of Medicine and resource libraries strategically located in relation to the smaller libraries to be assisted. 3. Federal support for the medical library network through the National Library of Medicine by means of deposits in microform of the National Library of Medicine journal holdings, and support for operating costs. 4. Local cooperative agreements between resource libraries and dependent libraries which would include the provision of photoduplication and telefacsimile services in lieu of the loan of materials. 5. The interconnection of the resource libraries with the National Library of Medicine and, in turn, with their complexes of local libraries through transmission links for the purpose of data transmission and telefacsimile communication. 6. The establishment in such resource libraries of MEDLARS search centers with tapes to be supplied by the National Library of Medicine...(3)

REGIONAL MEDICAL LIBRARY PROGRAM 1965-1971

In response to the Commission's mandate Congress passed the Medical Library Assistance Act (MLAA) in 1965 to provide funding for: 1) grants for training for medical library sciences; 2) assistance for special scientific projects and research in medical library science; 3) grants for establishing, expanding and improving basic resources of medical libraries; 4) grants and contracts for the establishment of regional

medical libraries; and, 5) financial support of biomedical scientific publications. With the passage of the MLAA and the first appropriation of funds ($200,000) for a regional library grant program in 1967 with an objective to "... improve health care by making biomedical information more readily available to those who are engaged in medical practice, education or research", NLM began its coordination of the Regional Medical Library Program.(4)

Because of the limited amount of funds available and the nature of the responsibilities to be assumed by those institutions designated as regional libraries, NLM determined that about ten libraries would be supported with available funds. The funding of these regional libraries would occur between 1965-1970. Each regional library would be expected to provide interlibrary loan services, MEDLARS services, reference services, consultation and continuing education programs. Priority would be given to interlibrary loan services and MEDLARS services.

> The first obligation of the regional libraries will be to provide interlibrary loan services to qualified users of such services within its area...In addition to this, it will be incumbent upon the regional library to either operate a MEDLARS search station and provide demand search services to its region or to have agreed to do so.(5)

Activities of all eleven regional libraries, then, focused on the provision of interlibrary loan services and the creation of MEDLARS centers between 1966-1971.

KOM REGIONAL MEDICAL LIBRARY ACTIVITY 1968-1971

While plans for the establishment of a regional medical library program which would include the state of Michigan were initiated as early as the fall of 1964, formal application for a regional medical library program incorporating the states of Kentucky, Ohio and Michigan was not submitted to NLM until 1968. Between 1964-1968 efforts were devoted to the development of an organizational structure within which the proposed region would function. The resolution of three major issues determined the organizational framework for the region. First, concerns about the inability of any one medical school library within the region to function effectively as the regional medical library led to the decision that the services available through the proposed Kentucky-Ohio-Michigan Regional Medical Library (KOMRML) would be offered through the respective medical school libraries participating in the program. Second, because of this decentralization of services the program participants agreed that the RML itself would be an administrative structure whose function would be to monitor, examine and develop the total complex of libraries composing the Regional Medical Library as well as to administer both funds and policies of the program. Third, the question of leadership was resolved with the appointment of a pro tem Director until the Executive Committee approved appointment of a Director. A Central

Office was established to fulfill the administrative functions of the RML. An Executive Committee, composed of representatives from each of the member institutions, was empowered to establish policy. A subcommittee of this group, to be named the Administrative Committee, would assume responsibility for operational details of the program.(6) Formal application for RML status was submitted to NLM in May 1968. In June 1968 NLM accepted the application, providing $100,000 for three years of operation.(7)

Between 1968-1971 KOM's energies, like those of all other RML's, focused on the development of a document delivery service and the provision of MEDLARS services. The foundation for a regional document delivery service existed in the document delivery services already offered by each member institution. These individual services would have to be coordinated and implemented so that a regional service would emerge. The major activities that were undertaken to develop this regional service included: 1) definition of the geographic area as well as the users for which each member institution would provide document delivery services; 2) exchange of serials holdings lists so that referrals between member institutions could occur; 3) development and implementation of a general policy statement as well as procedures for the regional document delivery service; 4) definition of a base line of activity for evaluation purposes; 5) development of data collection mechanisms for evaluation purposes; and, 6) development of a regional serials holdings list.(8)

In 1968, prior to the initiation of regional document delivery service, KOM's member institutions processed 33,450 interlibrary loans. In 1969, the first year that KOM's regional document delivery service was in operation, the region processed 44,058 interlibrary loans, an increase of 32%. Utilization of the region's document delivery services continued to increase during succeeding years. In 1970 the workload increased to 63,559, a growth rate of 36%. By 1971 the workload had reached 74,823, an increase of 18% over 1970, representing an increase of 90% since the inititation of the service.

Because MEDLARS Centers had already been established at both Ohio State University and the University of Michigan prior to the creation of KOM, activity would be limited to the coordination of services offered within the region. This coordination was limited to a referral process for routing patron requests for MEDLARS search services to either Ohio State or the University of Michigan. Funding for these two centers did not come from KOM's grant and so KOM had no jurisdiction over the centers. Consequently regional statistics that do exist on use of MEDLARS search services are neglible and in no way reflect actual use of the services.

While the preponderance of KOM's energy and funding was expended on the implementation and evaluation of a document delivery system within the region, other responsibilities of an RML were not totally neglected. Rather, groundwork was laid for future activity in the promotion of access to NLM databases (the successor to MEDLARS) and consultation.(9) Publicity activity between 1968-1971 concentrated on an information campaign designed to notify institutions of the existence of KOM and to describe the services available through KOM. The identification of

biomedical institutions within the region to receive publicity mailings served another purpose. An institutional file would be created for each institution identified in the publicity campaign so that the activity of each institution which had been contacted could be recorded. The data recorded in the institutional file would be used as a starting point in the identification of institutions to be contacted in future consultation programs.

ORIGINS OF KOM'S EXTRAMURAL PROGRAM

By mid-1971, after all eleven regional medical library programs had been operational for at least one full year, NLM formulated a policy statement for the RML program which was more definitive than the language of the Medical Library Assistance Act and which provided direction for future activities of the RML. The hierarchical structure outlined for the RML in this policy consisted of four levels of operation: National Library of Medicine, regional medical libraries, resource libraries, basic units. Specific responsibilities were assigned to each level of the structure as follows:

> The National Library of Medicine shall be responsible for: 1) network management and control; 2) national coordination of planning; 3) back-up resource for the regional medical libraries; 4) act as a regional medical library for the mid-Atlantic states...The Regional Medical Library: 1) shall be a back-up facility for the resouce libraries in the region; 2) shall be responsible for the planning of a coordinated system within the region for provision of library services; 3) shall indicate how resource and project grants which have regional implications fit into the regional plan. This indication shall not include a quality judgement of the proposal which is the prerogative of the Resources Review Committee and the Board of Regents. 4) Shall be a back-up for the education activities, supplying coordination and expertise in support of resource libraries' education efforts within the geographic area of their responsibility...The Resource Library shall: a) Support the information needs of the basic units located within its geographic area. b) Join with other resource libraries within the region in a coordinated effort to support network development including coordinated regional acquisitions with recognition of the RML's back-up role. Such a coordinated acquisitions plan could be a basis for requesting additional NLM support. c) Undertake such coordinated educational

> activities for the basic units in its geographic area as it deems necessary for the implementation of the regional plan. The Basic Unit shall indicate its willingness to underwrite the continuing cost of its participation. These include, but are not limited to, (a) adequate staff to supervise and manage the resources within the basic unit, and to assure effective communication with the resource library; (b) communication charges between basic unit and resource library.(10)

Significant in these definitions was the emphasis on the network development role of the RML and its resource libraries and the importance of the basic unit as a component of the network. This emphasis provided the impetus and the support for the diversification of RML programs beyond the provision of document delivery and MEDLARS services.

At the same time that NLM was involved in the preparation of its RML Program Policy Statement, KOM's Executive Committee

> ...determined that the further development of the Regional Medical Library Program required a more direct relationship with institutions (if participating libraries were to serve as back-up libraries) than could be gained through announcements and direct mailings.(11)

At its September 24, 1971 meeting the Executive Committee agreed that each Participating Library would designate a staff member whose primary function would be the encouragement of interactive hospital participation in the network. It was further agreed that the people designated as the hospital consultant would meet on a regular basis to draw up guidelines for a consultation program in KOM.

The Extramural Coordinators, as the consultants were named, met as a group for the first time in January 1972. Several decisions were made from which the philosophy of the Extramural Program emerged. First, the sharing of experiences by Coordinators was essential for both: 1) the formation of a frame of reference about: a) the hospital library environment; b) the nature of consultation; and, c) appropriate consultation activities and 2) for the creation of a sense of identity for the Coordinators. Second, extramural activities offered by the Participating Libraries would be provided via an institutional contact. Priority would be given to those institutions demonstrating a commitment to library service through the availability of a person responsible for the library or library services. Third, because all the resources/activities of the Participating Library could be utilized by institutions involved in a consultation program, the Extramural Coordinator would have to be based at a Participating Library. The Coordinator alone would be unable to provide all the expertise or resources that would be needed by the

hospital library. The Coordinator would then also be adequately prepared to explain the policies and procedures of the Participating Library as well as to expedite service through direct contact with the staff members at the Participating Library. Fourth, a reporting mechanism would have to be developed to record the activity of the region's extramural program.

These four concepts were then developed into a more comprehensive plan for KOM's Extramural Program. Initially the concept of the role of the Medical Library Consultant was reviewed. The history of this specialty is tied directly to the MLAA. With its mandate to extend the availability of biomedical information and its provision of funds for this purpose, the MLAA created an environment which required the use of consultants. So the new specialty emerged in 1965. By 1972, when KOM initiated its consultant program, the specialty was only six years old. Consequently descriptions of processes for developing consultant programs or evaluations of such programs were non-existent in the field of medical librarianship. Any guidance would have to be found in other areas of librarianship.

State Libraries had accepted the concept of consultation as early as the late 19th century. However, a distinct group of librarians who could be identified as consultants did not emerge until the 1950's with the passage of the Library Services & Construction Act (LSCA) of 1956 which provided funding for the employment of consultants on a large scale. Within 10 years not only were the state library consultant programs being described in the literature but the role of the consultant was also being examined. From the descriptions of the state library consultant programs four major observations were made which were significant in the philosophy and design of KOM's Extramural Program: 1) Because the responsibilities of consultants are determined by the agency supporting them, the information consultants give is related to the goals and objectives of that agency. 2) Because consultants function as change agents they may create problems for the institution seeking consultation. 3) The significant role that consultants may play for society may be that of implementors and planners of programs. 4) Finally, there is no description or report of any methodology used to evaluate the results of consultants' work.(12)

EVOLUTION OF DOCUMENTATION METHODS FOR KOM'S EXTRAMURAL PROGRAM

A) *FORMAT ONE (Summer 1972)*

The unavailability of a library designed mechanism which could be used to demonstrate the accountability of a consultant program meant that any model for data collection instruments would have to be found outside the library profession. Such a protocol had been developed to be used by mental health consultants in New Mexico to record their daily activities. This protocol consisted of a daily log form with a series of categories for each contact made by the consultant. The categories were arranged in a checklist fashion so that a minimal amount of time would be needed to complete the log.(13)

This daily log was modified for use in KOM's Extramural Program (Appendix 1, 2). The information to be reported on the log was arranged in eleven categories, each with a series of sub-categories. The eleven categories included: affiliation, time spent on contact, initiator of contact, contact type, location, tone, referrals, contact duration, future action, materials, activity categories. Each contact made by a Coordinator would be recorded on the log and the appropriate sub-categories for each category would be marked. A composite picture of an extramural contact would emerge from the information recorded on the log. It would be possible to categorize the institution contacted, purpose of the the contact and the nature of contact.

This original daily log was tested for a two week period in the summer of 1972. Use of the log continued as a regular procedure until fall 1972 when the Extramural Coordinators held their regular meeting. Considerable time was spent evaluating the log. There was general agreement that major problems existed. Lack of definitions for each category and sub-category was the primary concern. Some of the information requested was considered redundant or unnecessary. It was also suggested that a separate log sheet be used for each institution as well as for group contact. During this meeting it was decided that: 1) the log would be redesigned; 2) definitions would be written for each category and sub-category; and, 3) a procedure for using the log sheet would be prepared.

B) *FORMAT ONE - REVISION ONE (Spring 1973)*

The revised log sheet, including definitions and instructions, was completed in early 1973 (Appendix 3). This revised log condensed the original log to one page through the elimination of four categories (affiliation, tone, contact duration, future action) and the reduction of three others (initiated by, materials, activity categories). A procedure for using the log was completed at the same time (Appendix 4).

At the same time that the daily log was in the revision process, KOM was preparing a grant application to the National Library of Medicine requesting funding for KOM's Extramural Program.(14) Funds received through the grant would be used primarily to reimburse the activity of each Extramural Coordinator. The reimbursement rate would be $7.50 per professional hour and $4.75 per clerical hour. Another key stipulation of the grant application was the restriction of reimbursable extramural contacts to one per year per institution. Unlimited group contacts would be reimbursable. Pending announcement of the grant award, this reimbursement plan necessitated the creation of a program or expenditure report. Besides functioning as an invoice the program expenditure report would be used to tabulate the actual costs of the Extramural Program. The expenditure report, derived from the daily log, contained six general categories: institutional visits, office visits, meeting preparation, demonstration/exhibit preparation, meetings, report preparation (Appendix 5). By combining the information from both the daily log and the program expenditure report, KOM would be able to account for both the activity and the cost of its Extramural Program. This method of accountability was written into the grant application.

While the documentation methods developed between June 1972 and February 1973 were ready for official use in April 1973, grant funds were not awarded until May 1974. Consequently official use of the forms was delayed. The Extramural Coordinators met in May 1974 to review the two revised data forms so that the extramural activities scheduled during June 1974 could be recorded and would constitute the first month's record of activity for KOM's subsidized Extramural Program. During this review session it was stressed that all extramural activity should be recorded on the forms no matter which staff person was involved in the contact. Data would then reflect all activity in the region rather than just the activity of the Extramural Coordinators.

C) FORMAT ONE - REVISION TWO (AUGUST 1974)

As early as August 1974, only two months after the use of the forms began, it was necessary to make minor revisions so the forms would be easier to use. The log was modified so that the section for recording the time spent on a contact was expanded. A new section was added so that group activity could be indicated (Appendix 6, 7). The program expenditure report was also changed. Personnel time was divided into two categories, clerical (c) and professional (p) (Appendix 8, 9). The KOMRML Procedure 7 was revised to reflect the changes made in the forms (Appendix 10). At the time that the revised forms and procedures were distributed, Coordinators were reminded that: 1) together the logs and program expenditure report provide documentation for the Extramural Program; 2) each log represents time spent pursuing the aims of the Extramural Program while each program expenditure report represents an invoice for services rendered; and, 3) the comment section of the log emphasizes the extramural nature of the activity and must be completed before reimbursement for the contact can be made.

D) FORMAT ONE - ASSESSMENT

Use of the extramural log and program expenditure report as revised in August 1974 continued until Spring 1976 when a revision of all forms was undertaken. This decision to completely revise the forms was the result of efforts to summarize data collected via the August 1974 forms. The August 1974 forms adequately and easily captured information on the amount of time spent on six major activities: institutional visits, office visits, meeting preparation, demo/exhibit preparation, meetings, report time. The same data also revealed the amount of extramural activity that was reimbursable and the amount that was not. Considerable problems arose, however, when attempts were made to refine the data further. Because no categories were included on the log for items such as nature of the contact, type of institution contacted, type of person contacted etc., this information had to be extracted from the "comments" section of the log. Information here was in a narrative format so no predetermined terms or categories were available. The narrative had to be interpreted and this interpretation raised the problem of definition and synonymous terms for the same concept. Since comments are subjective in nature, there were also inconsistencies from one Coordinator to another in the kinds of information incorporated in the comments. Some comments included quantitative information while others did not. Even when all problems of interpretation and definitions could be solved, the compilation of data from the comments was extremely time-consuming.

Each comment had to be examined to determine what data was available and then the data had to be recorded in some way. Since no master form existed for comments, a tally sheet had to be arbitrarily created as each log sheet was examined. The work involved in the tabulation process was both archaic and tedious.

Compilation of the data from the logs also made it apparent that the forms were an inappropriate mechanism for documenting the impact of the Extramural Program. While the forms could capture the type of activity that was conducted through the Extramural Program, they provided no measure of the changes that occurred in the institutions contacted via the program.

In May 1976 a Task Force was appointed to revise the log so that the problems just described would be eliminated. In addition the Task Force was charged to develop appropriate forms to measure change that occurred at institutions contacted via the Extramural Program.

E) *FORMAT TWO - PART ONE (Fall 1976)*

In October 1976 a proposed log was distributed to the Extramural Coordinators for trial use during the last quarter of 1976. Suggestions made during the test period were incorporated into the revised form that was adopted in the beginning of 1977. The new log (Appendix 11) consisted of four sections: Part 1 - Contact; Part 2 - Expenditures; Part 3 - Extramural Coordinator's Travel Expense Report; and, Part 4 - Extramural Coordinator's Institution Evaluation.

Part 1 - Contacts - includes the same items that appeared in the log used between June 1974 and October 1976 plus two new items: "service performed by" and "nature of contact". The two new categories were added to incorporate data that previously appeared in the "comments" section of the log. The most significant change in this section is the method of recording data. Instead of checking appropriate boxes under each item, a coding system was devised. The appropriate code letter for the item is entered in the box for that item. Such a system eliminates the need for a "bedsheet" log which lists every possible response. This results in a log that is both manageable and easy to use. The log is approachable and so it is more likely to be used consistently and accurately. Data tabulation is only a matter of counting the number of times each code letter appears.

Part 2 - Expenditures - is the previous Extramural Expenditure Report. The incorporation of this data in the log makes it possible to determine precisely which activities will be reimbursed and which will not. It is also possible to determine where extramural monies are being spent - that is, on which types of contacts.

Part 3 - Extramural Coordinator's Travel Expense Report - constitutes the invoice for travel expenses associated with specific extramural contacts.

Part 4 - KOMRMI Extramural Coordinator's Institution Evaluation Form - represents the first efforts at assessing the institutions contacted

through the Extramural Program. Minimal information on administration, services and collection would be recorded. The combination of yes/no answers with a subjective code made the form unsatisfactory as a regular form and so it was agreed that this form would be an interim form to be used only until forms to measure change had been designed. Complete instructions incorporating the coding schemes were prepared to accompany the new forms (Appendix 12).

With the incorporation of the expenditure report into the log, the Extramural Coordinator would have to make a decision on the reimbursability of each specific contact. To facilitate this decision-making process and to provide standardization, a glossary was prepared which defined various activities as reimbursable or non-reimbursable (Appendix 13).

F) *FORMAT TWO - PART TWO (Spring 1978)*

In the spring of 1978 use of three forms, which were developed to measure change, was initiated. The first form, Institutional Annual Report (Appendix 14) incorporated the categories of the earlier evaluation report form (administration, services, collection) as well as the new categories of personnel, professional and network development, and technical services. The report consists of checklist questions, quantitative questions, and yes/no questions. It was designed to be used as a base line report as well as an annual report so that longitudinal assessments could be made. It was the first form developed in the program that could be used in this manner. The second form, Local Group Yearly Report (Appendix 15) contains yes/no questions about the nature of the local networks within the region. This form was designed to assess the volume and nature of networking activity. At the start of the Extramural Program only five formal local groups existed and the need for this form was not evident. By 1978 the number had grown to 13. This growth coincided with the extramural emphasis on group contacts. It became apparent, then, that data about these local groups needed to be collected as well as the data on individual institutions. The final form, Quarterly Activity Report (Appendix 16) synthesizes the activities of the given Extramural Coordinator during a specific quarter. This summary, based on the Extramural Coordinator's log, provides an overview of work for the Coordinator. Since its usefulness was limited, this form was used only for one year.

G) *CURRENT METHODS*

Since Spring 1979, then, three forms have been used to collect data that both quantify the activity of the Extramural Program and provide an indication of change in institutions and groups contacted via the program: 1) the three part Extramural Coordinators Log (in use since 1977); 2) Institutional Annual Report; and, 3) Local Group Yearly Report. The data gathered through the use of these forms will be the subject of a future report.

DISCUSSION

KOM's experience with the development of appropriate data collection devices for its Extramural Program has resulted in the following observations. First, any data collection mechanism used for evaluation purposes, particularly one used in a program designed to create change, should be tested in the work environment prior to regular use of the mechanism.

The input provided by the Extramural Coordinators as they used proposed forms resulted in improvements in the forms so that they would be both reliable and easy to use. In the test period, circumstances or events that are not discussed during the development of the forms may occur. These circumstances or events will demonstrate the viability of the proposed form. Second, detailed procedures explaining use of the forms should be available when the forms are tested and when the use of the forms is instituted as a regular practice. Such procedures eliminate confusion, misinterpretation or misunderstanding and result in consistently and regularly recorded data. Third, definition of terms is critical both for accurate data recording and for accurate interpretation of the data. If distinctions between categories are important it is essential that these definitions are precise. The more likely it is that a term will have multiple definitions, the more important it is that the term is completely defined. Fourth, attempts at combining all possible data items on one form produced a form that was cumbersome and confusing. The development of three individual data forms resulted in a more precise collection of data in more meaningful categories. Fifth, use of sub-categories within general categories provides a greater precision in data collection that allows interpretation beyond generalities. Sixth, forms should be designed with ease of data tabulation as a major concern. Meaningful data that is tedious to tabulate is unlikely to be compiled and analyzed. Seventh, while subjective data is often valuable for the evaluation of a program, quantification and interpretation of such data is imprecise. Eighth, data collection mechanisms should be reviewed on a regular basis to determine if: 1) additional categories, sub-categories, etc. should be added; 2) existing categories, sub-categories, etc. should be revised or even deleted: and, 3) new forms should be created.

CONCLUSION

The success of any library program at meeting its objectives should be measured in a quantitative manner that results in an objective assessment of the data available about the program. Crucial to this assessment process is the development of appropriate data collection mechanisms. KOM's experience with its Extramural Program demonstrates that the development of such mechanisms is an evolutionary process (two formats, three revisions, nine different forms in five years) which requires regular review and evaluation of data collection forms.

REFERENCES

1. The President's Commission on Heart Disease, Cancer & Stroke. "Report to the President", Volume 1, Washington, D.C.: GPO, 1964.

2. Ibid.

3. The President's Commission on Heart Disease, Cancer & Stroke. "Report to the President", Volume 2, Washington, D.C.: GPO, 1965.

4. Batterson, Dorothy L. & Horvath, Steven M. "The Regional Medical Library Program", American Journal of Medical Technology, Volume 3, (August, 1971), pp. 332-333.

5. Douglass, Carl D. "The Regional Medical Library Grant Program of the National Library of Medicine", Bulletin of the Medical Library Association, Volume 56 (April, 1968), p. 50.

6. At the time of application to NLM, the member institutions of KOM were: Cleveland Health Sciences Library, Medical College of Ohio at Toledo, Michigan State University, Ohio State University, University of Cincinnati, University of Detroit, University of Kentucky, University of Louisville, University of Michigan, and Wayne State University. Since 1968 three new institutions have been accepted as members: Wright State University (1976), Northeastern Ohio Universities College of Medicine (1978), and Ohio University (1979).

7. For detailed description of the formation of the Kentucky-Ohio-Michigan Regional Medical Library Program see: Pings, Vern M. "Kentucky-Ohio-Michigan Regional Medical Library Program: A Discussion of Its Formation", Kentucky-Ohio-Michigan Regional Medical Library, Papers & Reports, #3, April, 1969.

8. It should be noted that at the same time that document delivery and MEDLARS services were being established and coordinated, the RML was also developing its communication and decision-making policies and procedures. For a complete discussion of all KOM activity during its first years of operations see: Pings, Vern M. "KOMRML, The First Year's Experience", Kentucky-Ohio-Michigan Regional Medical Library, Papers & Reports, #5, 1970.

9. As a result of NLM's rejection of KOM's proposal for an educational program in its original application for RML status, KOM abandoned any plans for such a program.

10. "National Library of Medicine Regional Medical Library Program Statement", Bulletin of the Medical Library Association, Volume 60 (April, 1972), pp. 272-273.

11. Pings, Vern M. "The Medical Library Consultant - A Proposal for Investigation and Evaluation", Kentucky-Ohio-Michigan Regional Medical Library, Papers & Reports, #12, 1972.

12. Ibid.

13. Ibid.

14. Kentucky-Ohio-Michigan Regional Medical Library Extramural Coordinators Memo #16, 27 February 1973. It should be noted that the basic programs outlined in the grant originally appeared in Kentucky-Ohio-Michigan Regional Medical Library Working Paper #27, "A Proposal for Extending and Supporting Participating Library Extramural Programs", November, 1972.

APPENDICES

1. Daily Log (1972)
2. Sample Daily Log
3. Revised Log (1973)
4. KOMRML Procedure #7
5. Extramural Program Expenditure Report
6. Revised Log (1974)
7. Sample Revised Log
8. Revised Program Expenditure Report (1974)
9. Sample Revised Program Expenditure Report
10. Revised KOMRML Procedure #7 (1974)
11. KOMRML Extramural Coordinator's Log (1976)
12. Procedure for Completing KOMRML Form #19 (1976)
13. Extramural Activities Glossary (1976)
14. Institutional Annual Report (1978)
15. Local Group Yearly Report (1978)
16. Quarterly Activity Report (1978)

EXTRAMURAL COORDINATORS DAILY LOG

DATES																							TOTALS
CONTACT #																							
AFFILIATION																							
Resource Lib.																							
Hospital																							
Industry																							
Gov't. Org.																							
Educa. Org.																							
Foundation																							
Public Lib.																							
Prof. Soc.																							
Unaffiliated																							
Other																							
Group #																							
TIME																							
INITIATED BY																							
Coordinator																							
Client																							
Mutually																							
Third Party																							
CONTACT TYPE																							
Phone																							
Letter																							
Face to Face																							
LOCATION																							
Client Inst.																							
Coord. Inst.																							
Other																							
TONE																							
Positive																							
Negative																							
Neutral																							
Unknown																							

Appendix 1. Daily Log

EXTRAMURAL COORDINATORS DAILY LOG

DATES																						TOTALS
CONTACT #																						
REFERRALS																						
Res. Lib. Staff																						
Other Lib.																						
Other Agency																						
None																						
CONTACT DURATION																						
Scheduled Con't.																						
Intermittent																						
More Expected																						
No More Expected																						
FUTURE ACTION																						
Coordinator																						
Client																						
Both																						
Third Party																						
MATERIALS																						
Sent																						
Take With																						
ACTIVITY CATEGORIES																						
Initial Contact																						
Resource Person																						
Expediter																						
Technical Consultant																						
Network Development																						
Library Development																						
Direct Service																						
Educational Programs																						
Administrative Detail																						
Administrative Planning																						

Appendix 2. Sample Daily Log

EXTRAMURAL COORDINATORS DAILY LOG

DATES June	6				7		8			10		12			13	15			16			TOTALS
CONTACT #	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	21
AFFILIATION																						
Resource Lib.											✓											1
Hospital	✓	✓				✓			✓			✓	✓	✓			✓	✓	✓			10
Industry					✓																✓	2
Gov't. Org.																				✓		1
Educa. Org.				✓												✓						2
Foundation																						—
Public Lib.			✓																			1
Prof. Soc.																						—
Unaffiliated							✓															1
Other																						—
Group #								21		13					5							39
TIME	5m	3m	2hr.	3m	5m	1hr.	5m	2hr.	1hr.	2hr.	9m	3m	1hr.	5m	3hr.	1hr.	3m	5m	6m	1hr.	3m	14hrs.-55m
INITIATED BY																						
Coordinator		✓										✓	✓	✓							✓	5
Client	✓			✓		✓			✓		✓						✓	✓	✓	✓		9
Mutually			✓		✓					✓					✓							4
Third Party							✓	✓								✓						3
CONTACT TYPE																						
Phone	✓				✓						✓	✓					✓	✓	✓			7
Letter		✓							✓					✓							✓	4
Face to Face			✓	✓		✓	✓	✓		✓			✓		✓	✓				✓		10
LOCATION																						
Client Inst.			✓										✓		✓							3
Coord. Inst.	✓	✓		✓	✓	✓	✓		✓		✓	✓		✓		✓	✓	✓	✓	✓	✓	16
Other								✓		✓												2
TONE																						
Positive	✓	✓	✓	✓		✓		✓	✓	✓					✓	✓				✓		11
Negative											✓			✓			✓				✓	3
Neutral					✓		✓					✓	✓					✓	✓			6
Unknown																						—

Appendix 2. Sample Daily Log

EXTRAMURAL COORDINATORS DAILY LOG

DATES June	6				7		8			10		12			13	15			16			TOTALS
CONTACT #	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	(21)
REFERRALS																						
Res. Lib. Staff	✓	✓				✓					✓	✓					✓	✓	✓			8
Other Lib.					✓																	1
Other Agency													✓									1
None			✓	✓			✓	✓	✓	✓				✓	✓	✓				✓	✓	11
CONTACT DURATION																						
Scheduled Con't.													✓		✓	✓						[illegible]
Intermittent		✓										✓					✓	✓		✓		[illegible]
More Expected			✓			✓		✓	✓	✓	✓			✓					✓			[illegible]
No More Expected	✓			✓	✓		✓														✓	5
FUTURE ACTION																						
Coordinator																						—
Client	✓	✓				✓			✓			✓	✓	✓			✓	✓	✓			10
Both			✓					✓			✓				✓	✓						5
Third Party										✓										✓		2
MATERIALS																						
Sent		✓	✓						✓				✓					✓				5
Take With						✓		✓		✓												3
ACTIVITY CATEGORIES																						
Initial Contact					✓	✓		✓														3
Resource Person				✓			✓		✓			✓		✓								5
Expediter	✓	✓															✓	✓	✓		✓	6
Technical Consultant													✓									1
Network Development			✓												✓					✓		3
Library Development																						—
Direct Service																						—
Educational Programs										✓												1
Administrative Detail																✓						1
Administrative Planning											✓											1

Appendix 3. Revised Log
KOMRML Extramural Coordinators Log

) Month:_____ (2) Participating Library:_____

) Institution Name:_____ (4) ID #_____

) Address:_____ (6) Contact Person(s) Position:_____

_____ _____

_____ (7) Accredited: ☐ Yes ☐ No (8) Bed Size:_____

) Dates																Totals
) Initiated by:																
Coordinator																
Client																
Third Party																
) Contact Type																
Phone																
Letter																
Face to Face																
) Location																
Client Inst.																
Coord. Inst.																
Other																
) Referrals																
Part. Lib. Staff																
Other Library																
Other Agency																
None																
) Consultant Materials																
Supplied																
) Activity Categories																
Resource Person																
Expeditor																
Technical Consultant																
Direct Service																
) Contact Time																

) Comments:

Appendix 4. KOMRML Procedure 7

KOMRML Procedure 7

Extramural Service

A. KOMRML Extramural Coordinator Log

KOMRML Form #19 is to be completed by the Extramural Coordinator for each institution contacted or group activity (workshop, meeting, etc.) instigated during a reporting period in the following manner:

1. Month: insert inclusive dates of the month being reported.

2. Participating Library: enter name of KOMRML participating library preparing the report.

3. Institution Name: fill out in one of the following ways:

   a) the name of the institution contacted by or contacting the Extramural Coordinator.

   b) the title of the workshop, meeting, program, etc. organized by the Extramural Coordinator.

4. ID#: fill out in one of the following ways:

   a) if referring to an institution, it is that number assigned to the institution by the participating library as described in Procedure 4 under Table of Codes.

   b) if referring to a group activity, leave blank.

5. Address: fill out in one of the following ways:

   a) if referring to an institution, it is the mailing address of the institution.

   b) if referring to a group activity, it is the place where the activity actually took place.

6. Contact Person(s) Position: fill out in one of the following ways:

   a) if referring to an institution, it is the title of the person(s) contacted by or contacting the Extramural Coordinator.

   b) if referring to a group activity, it is the type or audience (librarians, students, etc.) contacted by the Extramural Coordinator.

7. Accredited: fill out in one of the following ways:

   a) if referring to an institution, check appropriate area indicating whether the institution is accredited by the Joint Commission on Accreditation of Hospitals.

b) if referring to a group activity, leave blank.

8. Bed Size: fill out in one of the following ways:

a) if referring to an institution, it is the number of beds within the hospital.

b) if referring to a group activity, it is the number of attendees.

9. Dates: supply the actual date within the month that the contact(s) was made.

Each of the following areas is to be checked within the column under the appropriate date of activity.

10. Initiated by: place a check in one of the following areas:

a) Coordinator - check if the contact was initiated by the Extramural Coordinator.

b) Client - check if the contact was initiated by a member of an institution or organization.

c) Third Party - check if the contact was initiated by person(s) other than the Extramural Coordinator or Client.

11. Contact Types: place a check in one of the following areas:

a) Phone - check if contact was initiated by phone call by the Extramural Coordinator, client, or third party.

b) Letter - check if contact was initiated by a letter from the Extramural Coordinator, client, or third party.

c) Face-to-Face - check if contact was initiated in person by the Extramural Coordinator or client.

12. Location: place a check in one of the following areas:

a) Client Inst. - check if actual contact or meeting took place in the institution with which the client is affiliated.

b) Coord. Inst. - check if actual contact took place at the participating library.

c) Other - check if activity took place at a location other than the client's institution or the participating library.

13. Referrals: place a check in as many areas as applicable:

a) Part. Lib. Staff - check if Extramural Coordinator refers client to other members of the participating library staff.

b) Other Library - check if Extramural Coordinator refers client to a library other than the participating library.

c) Other Agency - check if Extramural Coordinator refers client to an organization other than that designated as a library.

d) Name - check if Extramural Coordinator does not refer client to participating library staff, another library, or agency.

14. Consultant Materials: check only if supplies or materials are given to the client.

15. Activity Categories: place a check in as many areas as applicable:

a) Resource Person - check if Extramural Coordinator informs client of services available to the client through the KOMRML program.

b) Expeditor - check if Extramural Coordinator acts as a referral agent or "ombudsman" for the client.

c) Technical Consultant - check if the Extramural Coordinator is asked to use his library expertise or skills in his contact with the client.

d) Direct Service - check if the Extramural Coordinator is asked to explain what constitutes library service to the client.

16. Contact Time: supply figures indicating the amount of time the Extramural Coordinator has spent with the client. Designate the unit of time used by using "m" for minutes or "h" for hours.

17. Comments: supply any information that the Extramural Coordinator feels is pertinent that has not been covered previously (back of the page may be also be used*).

*Note: If back of page is used, both sides of page must be copied when reporting to Central Office.

B. Extramural Program Expenditure Report (Taken from Working Paper #27)

1. Institutional visits: the time a consultant spends in visiting a basic unit library, whether for purpose of advising, instructing or surveying would be recorded in this category. This would also include travel time. The cost of the travel would also be listed. The time to prepare a report for the institution would be included in 6.

2. Office visits: a visit, or a phone call made to participating library, or a phone call to a basic unit library takes staff time. What should be recorded here is consultation services, not planning sessions for workshops or seminars. Such activity should be reported in 3. Only personnel and communication costs should be listed here.

3. Preparation for meetings: the time for planning sessions for local group meetings, local seminars, preparation for institutional visits belong to this category. Occasionally such planning sessions might be held at other than the participating library so travel time and expenses might also occur.

4. Preparation of demonstrations and exhibits: MEDLINE demonstrations, once the format of procedure is established, may not take much time, but other exhibits prepared for state or county medical society meetings, or local conventions to be effective must be well done. Special supplies may be needed.

5. Meetings: the time spent at any group activity which can include manning exhibits, monitoring workshops and seminars, local library organizational meetings are reported in this category. It should not include instances in which participating library staff are "teachers" in workshops and seminars.

6. Preparation of reports, minutes, correspondence...: the work done on this program must be recorded not only for fiscal accountability, but for evaluation and planning purposes. This work is an exceedingly important part for further regionalization.

REPORTING SCHEDULE

The reporting of Extramural Service will begin as of April, 1973.

Due Dates for Extramural Service
Reports to Central Office

Activity Period	Date Due at Central Office
*April, 1973	May 10, 1973
May	June 10, 1973
June	July 10, 1973
*July	August 10, 1973
August	September 10, 1973
September	October 10, 1973
*October	November 9, 1973
November	December 10, 1973
December	January 10, 1974
*January, 1974	February 8, 1974

*Quarterly Activity Reports also due.

Appendix 5

Extramural Program Expenditure Report

	Personnel time (in hours)	Communications (in $)	Supplies (in $)	Travel (in $)
1. Institutional visits				
2. Office visits				
3. Meeting preparation				
4. Demonstration, exhibit preparation				
5. Meetings				
6. Report preparation and distributions				
Total				

Revised
26 August 1974

Appendix 6. Revised Log (1974)
KOMRML Extramural Coordinators Log

1. Year:_____ 2. Participating Library:_____

3. (Host) Institution:_____ 4. ID #:_____

5. Address: _____ 6. Contact Person(s) Name:_____

_____ Position:_____

_____ 7. Accredited: __Yes __No 8. Bed Size _____

		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	Total
9.	Dates																
10.	Initiated by:																
	Coordinator:																
	Client:																
	Third Party:																
11.	Contact Type:																
	Phone:																
	Letter:																
	Face to Face:																
12.	Location:																
	Client Inst:																
	Coord. Inst:																
	Other:																
13.	Referrals:																
	Part. Lib. Staff:																
	Other Library:																
	Other Agency:																
	None:																
14.	Consultant Materials:																
	Supplied:																
15.	Activity Categories:																
	Resource Person:																
	Expeditor:																
	Tech. Consultant:																
16.	Group Activity:																
17.	Time:																
	Contact:																
	Preparation:																
	Demo/ Exhibit:																
	Report:																
	Travel:																

18. Comments:

Revised
KOMRML Form No. 19

Appendix 7. Sample Revised Log
KOMRML Extramural Coordinators Log

1. Year: 1974 2. Participating Library: WSU

3. (Host) Institution: Hurley Hospital 4. ID #:

5. Address: Medical Library 6. Contact Person(s) Name:

Sixth Ave. & Begole St. Position:

Flint, Mich. 48502 7. Accredited: __Yes __No 8. Bed Size

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	Total
9. Dates	8/2	8/15														
10. Initiated by:																
Coordinator:																
Client:	x	x														
Third Party:																
11. Contact Type:																
Phone:	x															
Letter:																
Face to Face:		x														
12. Location:																
Client Inst:		x														
Coord. Inst:	x															
Other:																
13. Referrals:																
Part. Lib. Staff:																
Other Library:																
Other Agency:																
None:	x	x														
14. Consultant Materials:																
Supplied:	x	x														
15. Activity Categories:																
Resource Person:	x															
Expeditor:																
Tech. Consultant:		x														
16. Group Activity:		x														
17. Time:																
Contact:	5m	90m														
Preparation:		30m														
Demo/ Exhibit:																
Report:	1m	1m														
Travel:		15m														

18. Comments: 1. Would like to set up MEDLINE demonstration for possible consortia members.
2. MEDLINE demonstration for 6 hospital administrators, 13 staff members from 4 hospitals, 6 librarians.

Revised
KOMRML Form No. 19

Revised
26 August 1974

Appendix 8. Revised Program Expenditure Report

Extramural Program Expenditure Report

	Personnel time (in hours)		Communications (in $)	Supplies (in $)	Travel (in $)
	C	P			
1. Institutional visits					
2. Office visits					
3. Meeting preparation					
4. Demonstration, exhibit preparation					
5. Meetings					
6. Report preparation and distributions					
Total					

Revised
26 August 1974

Appendix 9. Sample Revised Program Expenditure Report

Extramural Program Expenditure Report

	Personnel time (in hours)		Communications (in $)	Supplies (in $)	Travel (in $)
	C	P			
1. Institutional visits	14	---			30.00
2. Office visits	3	---			
3. Meeting preparation	8	16	4.10	2.50	
4. Demonstration, exhibit preparation	5	8	1.10	18.00	
5. Meetings	16	---			6.50
6. Report preparation and distributions	3	5	----	----	
Total	49	29	5.20	20.50	36.50

EXTRAMURAL SERVICE

KOMRML Extramural Coordinators Log (KOMRML form no. 19)

KOMRML Form #19 is to be completed by the Extramural Coordinator for each institution contacted or group activity (workshop, meeting, etc.) instigated during a reporting period in the following manner:

1. Year: Show grant period being reported (i.e. 74-75).

2. Participating Library: Enter name of KOMRML participating library preparing the report.

3. Institution Name: Fill out in one of the following ways:

   (a) the name of the institution contacted by or contacting the Extramural Coordinator.

   (b) the name of the institution acting as host for the workshop, meeting, program, etc. organized by the Extramural Coordinator.

4. ID#: Leave blank. Central Office will complete.

5. Address: Insert the complete mailing address of the institution.

6. Contact person(s) Position: Enter librarian's name, or that of original contact person.

7. Accredited: Leave blank. Central Office will complete.

8. Bed Size: If referring to an institution leave blank. Central Office will complete if the institution is an accredited hospital.

9. Dates: Supply the month and day of each contact.

Each of the following areas is to be checked within the column under the appropriate date of activity.

10. Initiated by: Place a check in one of the following areas:

    (a) coordinator-check if the contact was initiated by the Extramural Coordinator.

    (b) client-check if the contact was initiated by a member of an institution or organization.

    (c) third party-check if the contact was initiated by person(s) other than the Extramural Coordinator or client.

11. Location: Place a check in one of the following areas:

    (a) phone-check if contact was initiated by phone call by the Extramural Coordinator, client, or third party.

    (b) letter-check if contact was initiated by a letter from the Extramural Coordinator, client, or third party.

    (c) face-to-face-check if contact was initiated in person by the Extramural Coordinator or client.

12. Location: Place a check in one of the following areas:

(a) client inst.-check if actual contact or meeting took place in the institution with which the client is affiliated.

(b) coord. inst.-check if actual contact took place at the participating library.

(c) other-check if activity took place at a location other than the client's institution or the participating library.

13. Referrals: Place a check in as many areas as applicable:

(a) participating library staff-check if Extramural Coordinator refers client to other members of the participating library staff.

(b) other library-check if Extramural Coordinator refers client to a library other than the participating library.

(c) other agency-check if Extramural Coordinator refers client to an organization other than that designated as a library.

(d) name-check if Extramural Coordinator does not refer client to participating library staff, another library, or agency.

14. Consultant Materials: Check only if supplies or materials are given to the client.

15. Activity Categories: Place a check in as many areas as applicable:

(a) resource person-check if Extramural Coordinators informs client of services available to the client through the KOMRML program. No institutional report is made if the client only requires information about normal participating library services or routines.

(b) expeditor- check if Extramural Coordinator acts as a referral agent or "ombudsman" for the client.

(c) technical consultant-check if the Extramural Coordinator is asked to use his library expertise or skills in his contact with the client.

16. Group Activity: Insert number of attendees if this is a group activity.

17. Time: Enter the total number of minutes for each category involved in a single contact. More than one category may be used. Use these figures to summarize the clerical and professional time spent in each category for the monthly invoice form.

18. Comments:

(a) each contact must contain a one or two sentence explanation of the purpose of the contact in terms of its regional applicability, No report should be made of a contact by an institution when the contact is primarily for the purpose of exploiting the services or staff of a participating library.

(b) Comments should be numbered tocorrespond with the number over the contact box. (see Example.)

EXTRAMURAL PROGRAM EXPENDITURE REPORT (KOMRML Form #20)

1. Institutional visits: From the logs, summarize separately all clerical and all professional staff time in hours spent in contacts at the institution being reported through the logs for a particular month. Travel time covering such meetings should also be reported and documented by submission monthly of the completed WSU monthly mileage log, giving speedometer readings for each visit.

2. Office visits: A visit or phone call made to a participating library or a phone call to a basic unit library takes staff time which can be summarized and reimbursed for here. What should be recorded here is consultation services rather than planning sessions for workshops, seminars, etc. Such activity should be reported in #3. Only personnel (both clerical and professional) should be listed here.

3. Preparation for meetings: The time for planning sessions for local group meetings, local seminars, preparation for institutional visits belong to this category. This includes travel time, where applicable. Costs for postage, phone calls and various supplies are legitimate expenses and should be summarized. Travel expenses involved for meeting preparation should be included under "institutional visits, travel," and documented with WSU travel expense forms, or mileage logs or both.

4. Preparation of demonstrations and exhibits: MEDLINE demonstrations, once this format of procedure is established, may not take much time, but other exhibits prepared for state or county medical society meetings, or local conventions to be effective must be well done. Special supplies may be needed.

5. Meetings: The time spent at any group activity which can include manning exhibits, monitoring workshops and seminars, local library organizational meetings are reported in this category. It should not include instances in which participating library staff are "teachers" in workshops and seminars, if other funds are expended for this purpose. Travel expenses should be summarized and documented with the WSU travel expense forms or the WSU monthly mileage log or both. Travel time to the meeting is summarized for the personnel costs.

6. Preparation of Reports, minutes, correspondence: The work done on this program must be recorded not only for fiscal accountability but for evaluation and planning purposes. This work is an exceedingly important part for further regionalization.

7. Total: Summarize the various columns.

REPORTING SCHEDULE

The reporting of Extramural Service will begin as of July 10, 1974.

Due Dates for Extramural Service
Reports to Central Office

Activity Period	Date Due at Central Office
May	
June	July 10, 1974**
July	Aug. 9, 1974*
August	Sept. 10, 1974*
September	Oct. 10, 1974**
October	Nov. 10, 1974*
November	Dec. 10, 1974*
December	Jan. 10, 1975**
January, 1975	Feb. 10, 1975*
February	Mar. 10, 1975*
March	Apr. 10, 1975**

*ILL Institutional Report forms, Participating Library Borrowing Report Form, MEDLINE logs, and Extramural Report Forms due

**Quarterly Activity Reports also due

KENTUCKY-OHIO-MICHIGAN REGIONAL MEDICAL LIBRARY PROGRAM
EXTRAMURAL COORDINATOR'S LOG

2. YEAR: _____
3. NAME: _____
4. ADDRESS: _____
_____
5. PARTICIPATING LIBRARY: _____
6. CONTACT PERSON: _____
7. POSITION: _____
8. CATEGORY: _____

PART I: CONTACT		1	2	3	4	5	6
1. DATE OF CONTACT							
2. INITIATOR OF CONTACT							
3. SERVICE PERFORMED BY							
4. REFERRED TO							
5. NATURE OF CONTACT							
6. PLACE OF CONTACT							
7. CONTACT TYPE							
8. GROUP ACTIVITY							
PART II: EXPENDITURES							
1. PREPARATION TIME	PROF.						
	CLERICAL						
2. CONTACT TIME	PROF.						
3. TRAVEL TIME	PROF.						
4. REPORT TIME	PROF.						
	CLERICAL						
5. TIME TOTAL	PROF.						
	CLERICAL						
6. COMMUNICATIONS	POSTAGE						
	PHONE						
7. SUPPLIES							

Use reverse of this form for comments.

KOMRML EXM Form # 19

PART III

Please submit promptly to assure quick reimbursement
EXTRAMURAL COORDINATORS TRAVEL EXPENSE REPORT

Send to:
Kentucky-Ohio-Michigan Regional Medical Library
Wayne State University
Shiffman Medical Library
4325 Brush
Detroit, Michigan 48201

PAYEE _____
(full name of traveler/institution requesting reimbursement)

ADDRESS _____

_____
(Check will be mailed to this address)

Places Visited

Enter here both the name of the institution, business, agency visited and the name of the city.

Dates of Trip _____

Purpose of Trip The words "Extramural Activity" are sufficient here.

Accompanied by:
(if by auto)

_____

_____

EXPENSES

	Dates / /	/ /	/ /
I. *Lodging (Limit $30.00 per day)			
II. Meals (Limit $16.50 per day)			
Breakfast only (Limit $2.50)			
Lunch only (Limit $4.00)			
Dinner only (Limit $10.00)			
III. Transportation			
*Air			
Rail			
*Bus			
Taxi and/or Limousine			
*Rental Car			
Auto (14¢ per mile, fill out attached log)			
IV. Miscellaneous			
Tips (other than for meals)			
Telephone/Telegrams			
Parking/Storage			
Tolls (Bridge, Turnpike, Tunnel)			
Other (Please explain)			
TOTALS			

TOTAL TRAVEL EXPENSE _____

*Payment cannot be made unless receipt is attached to this report.

PART IV

KOMRML EXTRAMURAL COORDINATOR'S INSTITUTION EVALUATION FORM

1. Year:_____
2. Name:_____
3. Address:_____
_____
_____
4. Participating Library:_____
5. Contact Person:_____
6. Position:_____
7. Category:_____

Part IV: First Evaluation Date:_____

	YES	NO
A. General library evaluation_____		
B. Administration		
1. Is there a person in charge of the library?		
full time?		
part time?		
2. Does the person have an MLS?		
3. What is the source of library funding: staff		
institution		
grant		
other		
4. Is the librarian or the library a member of a library organization?		
MLA		
Local group		
Other		
5. Is the library housed in a special space or room?		
6. Is there a library committee?		
7. Has the library ever applied for an NLM grant?		
Was the grant funded?		
C. Services		
1. Is reference service provided?		
2. Are Interlibrary Loan services used?		
3. Are MEDLINE services used?		
4. Does the library have its own MEDLINE terminal?		
D. Collection:		
1. How many volumes?_____		
2. How many journal subscriptions?_____		
3. Are materials cataloged?		
4. Are journals bound?		
5. Is there an audiovisual collection?		

CODE AS FOLLOWS FOR "A. General Library Evaluation"

L1: Adequate funding, enthusiastic librarian, existing library appears supported by Administration and Staff

L2: Adequate funds not available, enthusiastic librarian but support of Library Development by Administration and staff non-existent

L3: Funds available, non-enthusiastic library personnel, support of library by Administration and staff underdeveloped

L4: Funds available, non-enthusiastic library personnel but no support of library by staff

L5: No funds, facilities or interest

APPENDIX 12. Procedure for Completing KOMRML Form #19

KENTUCKY-OHIO-MICHIGAN REGIONAL MEDICAL LIBRARY PROGRAM

EXTRAMURAL COORDINATOR'S LOG

PROCEDURE FOR COMPLETING KOMRML FORM #19

(One form is to be completed by the Extramural Coordinator for each contact instigated during a reporting period.)

1. Page	Indicate page number if more than one year log sheet is used for an institution per year.
2. Year	Calendar year reported (i.e. 1977, 1978)
3. Name	Name of Client: Institution, business firm, organization contacted by or contacting the Participating Library. Under certain circumstances, the name of the PL service area or name of an activity (e.g. workshop) may be used.
4. Address	Complete mailing address of the institution or business firm. For organization or local group use the President's chairperson's business address.
5. Participating Library	Name of the Extramural Coordinator's PL.
6. Contact Person	Name of the original Contact person. For organization or local group use the President's or Chairperson's name.

7. Category (Enter code for the category under #3 according to the following list. Example: Clinical Diagnostic Laboratory-PC4a)

CODE	CATEGORY	DEFINITIONS
PC (Patient Care)	1. Clinic	(Clinical Medicine, Nursing, Dentistry) (e.g. infirmary, rehab. center for physical, emotional, mental care, community medical center; also specialities, such as opthalmology, outpatient)
	2. Dental	(Office practice)
	3. Hospital	(All inpatient service except nursing--as primary function)

rev. 12/77

CODE	CATEGORY	DEFINITIONS
	4. Laboratory	(Clinical)
	a. Diagnostic	e.g. radiology, opthalmology, etc.
	b. Therapy	
	5. Nursing	(e.g. nursing, home for aged)
E (EDUCATION)	1. Area Health Education Center (AHEC)	
	2. Association	(Also society, organization, etc.)
	a. Local Health Science Lib. Groups	
	3. Board of Health	
	a. County	
	b. Municipal	
	c. State	
	4. College & University	
	5. Foundation	(Primary purpose education rather than research - such as Kellogg Foundation).
	6. Health Systems Agency (HSA)	
	7. Library	(Other than health)
	a. County	
	b. Municipal	
	c. State	
	8. Schools	(Other than college & university)
	a. primary & secondary	
	b. vocational	
	c. special	(Primary purpose education rather than clinic setting for diagnosis or therapy, e.g. schools for exceptional children)
	d. nursing schools	
	9. CE Activity	(Workshops, seminars, conferences that include personnel of more than one institution, organization, or business).

rev. 12/77

CODE	CATEGORY	DEFINITIONS
S (SOCIAL SERVICE)		(Social welfare e.g. United Fund. social agencies, community centers which would not be considered clinics)
B (BUSINESS)	#1. Industrial	(Primary purpose profit e.g. pharmaceutical firms, automobile, etc.)
	#2. Insurance	(e.g. Blue Cross)
	#3. Legal	
	#4. Other	(e.g. health planning consultants, veterinarians)
R (RESEARCH)	#1. Foundations	(Primary research or education e.g. Kettering)
	#2. Institute	
	#3. Government	
	#4. Laboratory	

PART I - CONTACT

1. Date of Contact — Self Explanatory.

2. Initiator of Contact — Use the following Code for person initiating the contact.

Code

a. Extramural Coordinator
b. Participating library staff
c. University staff
d. Librarian/Contact Person
e. Administrator or Executive Officer
f. Local Group
g. Other

3. Service Performed by: — Code according to the following. (Use as many as are applicable)

Code

a. Extramural Coordinator
b. Participating library staff
c. University staff

4. Referred to: — Code according to the following. (Use as many as are applicable)

Code

a. Organization other than that designated as library
b. Library other than a participating library
c. Another participating library
d. Local Group
e. Participating library staff
f. None

5. Nature of Contact — Code for nature of contact according to the following:

CODE and DEFINITION	CATEGORY
TS (TECHNICAL SERVICE)	
(Specific technics demonstrated, taught or performed in cases where person's technical knowledge is necessary)	1. Audiovisual
	2. Cataloging
	3. Collection Development
	4. Document Delivery
	5. Editing
	6. Exhibits
	7. MEDLINE
	8. Other Search Services
	9. Reference Service (Organizing Service)
	10. Serial Control
RS (RESOURCE)	
(General principles described, or acting as available resource person in particular situation)	1. Library Service, General
	2. Audiovisual
	3. Bibliographic Search Service (e.g. MEDLINE)
	4. Consortium Development
	5. Improvement Grants
	6. Project Grants
	7. KOMRML policies and PL policies and procedures
	8. Local meetings, conferences or workshops attended (not restricted to library type)
	9. Consumer Health Education
EX (EXPEDITOR)	
(Perform tasks or advise in production of a product)	1. Grant Application Review
	2. Planning
	3. Reports to Newsletters etc. (Writing Report)

4. Workshops, seminars, etc.
5. KOM Service Area Mailing

6. Place of Contact — Code for place where service was performed according to the following:

Code

a. Client institution
b. Participating library
c. Other (Local meeting always coded here)

7. Contact type — Code non-group activities according to the following. (For group activity, see no. 8)

Code

a. Face to face
b. Phone
c. Mailing (letters, bulletins, newsletters, etc)

8. Group Activity — Enter number of persons in group (face to face contact)

PART II - EXPENDITURES (REPORT ALL TIME IN MINUTES)

1. Preparation Time — Enter professional and/or clerical time used to prepare for this contact.

2. Contact Time — Time for actual contact or service.

3. Travel Time — Time for travel to and from contact site.

4. Report Time — Enter professional and/or clerical time used to prepare this report form. (Follow-up reports to client equals a new contact).

5. Total Time — Total professional and/or clerical time for categories 1-4.

6. Communications ($) — Total $ amount spent for postage and/or long distance telephone calls for this contact.

7. Supplies ($) — Total $ amount spent for supplies for this contact.

rev. 12/77

1. Page: _____

KENTUCKY-OHIO-MICHIGAN REGIONAL MEDICAL LIBRARY PROGRAM
EXTRAMURAL COORDINATOR'S LOG

2. YEAR: _____

3. NAME: _____

4. ADDRESS: _____

_____

5. PARTICIPATING LIBRARY: _____

6. CONTACT PERSON: _____

7. POSITION: _____

8. CATEGORY: _____

PART I: CONTACT		1	2	3	4	5	6
1. DATE OF CONTACT							
2. INITIATOR OF CONTACT							
3. SERVICE PERFORMED BY							
4. REFERRED TO							
5. NATURE OF CONTACT							
6. PLACE OF CONTACT							
7. CONTACT TYPE							
8. GROUP ACTIVITY							
PART II: EXPENDITURES							
1. PREPARATION TIME	PROF.						
	CLERICAL						
2. CONTACT TIME	PROF.						
3. TRAVEL TIME	PROF.						
4. REPORT TIME	PROF.						
	CLERICAL						
5. TIME TOTAL	PROF.						
	CLERICAL						
6. COMMUNICATIONS	POSTAGE						
	PHONE						
7. SUPPLIES							

Use reverse of this form for comments.

KOMRML EXM Form # 19

APPENDIX 13. Extramural Activities Glossary

KENTUCKY-OHIO-MICHIGAN REGIONAL MEDICAL LIBRARY PROGRAM

EXTRAMURAL ACTIVITIES

GLOSSARY

ADDRESS LABELS	CO supplies address labels for mailings.
AUDIOVISUAL EQUIPMENT (See EQUIPMENT)	
BOOKS (See also SUBSCRIPTIONS)	Cost is not reimbursable.
BROCHURE (See also PRINTING)	Brochures explaining the KOMRML network are available from CO.
CENTRAL OFFICE CONTACTS (See also TRAVEL)	Neither time nor charges for telephone calls to CO are reimbursable unless information is requested from the PL staff to be submitted via telephone.
CONFERENCE FEES	Not reimbursable.
CONNECT TIME	A Special ID number for MEDLINE demonstration is available from NLM. Under certain circumstances charges may be reimbursed. Such charges should be entered under supplies on ExMC Form #19.
CONSUMER EDUCATION	No cost for contacts of this type are reimbursable.
CONTACT	To be interpreted as a planned effort to inform or to educate health professionals of the community in matters pertaining to the BCN. Expired time to plan, make contact and return to home base is reimbursable.
DISPLAYS (See EXHIBIT)	
DUES (See MEMBERSHIP FEE)	
DUPLICATING (See PHOTOCOPY)	
EQUIPMENT	Cost of rental of equipment, such as audiovisual hardware or software, is reimbursable. Purchase of equipment is not reimbursable.

EXHIBIT	Cost of rental of equipment or space and purchase of supplies to create an exhibit is reimbursable.
FOOD (See also MEALS)	Cost of refreshments served during breaks is not reimbursable.
GROUP	Two or more persons from more than one institution constitute a group.
HONORARIUMS	No funds are available for honorariums, with the exception of those earned by a PL for extramural activities.
HOTEL/MOTEL ROOMS (See also ROOMS)	Cost of rental of rooms during extramural contacts is reimbursable.
LABELS (See ADDRESS LABELS)	
LIQUOR	Cost not reimbursable.
MAGAZINES (See SUBSCRIPTIONS)	
MAILINGS (See also ADDRESS LABELS)	Cost of postage and supplies as well as time is reimbursable.
MEALS (See also FOOD)	Cost of meals for ExMC, PL staff or University staff purchased during an official contact is reimbursable.
MEDLINE	Cost of time to teach technics, inform health professional is reimbursable. Cost of time to run searches is not reimbursable.
MEDLINE DEMONSTRATION (See CONNECT TIME)	
MEETINGS (See also TRAVEL)	Cost of time to travel to or to attend meetings planned for the health professionals of the community is reimbursable. Cost of time to travel or to attend meetings organized by CO in conjunction with the program is not reimbursable.
MEMBERSHIP FEES (See also CONFERENCE FEES)	Not reimbursable.
MOTEL (See HOTEL/MOTEL ROOMS)	

PATIENT EDUCTION (See CONSUMER EDUCATION)	
PAMPHLETS (See BOOKS)	
PENS & PENCILS	Cost is reimbursable for official extramural activities. Enter under supplies on ExMC Form #19.
PHOTOCOPY	Cost to copy information material for official extramural activities is reimbursable.
PL to PL CONTACTS	Cost of time, communications or travel between PL's for official extramural contacts is reimbursable.
POSTAGE (See also MAILINGS)	Cost of postage for official extramural activities is reimbursable.
PRIMARY CLIENTELE	Cost of these contacts not reimbursable.
PRINTING	Cost of printing brochures, annoucements, newsletters etc. for official extramural activities is reimbursable. Cost of printing the same for meetings of local group planned or organized with the ExMC is reimbursable.
QUICK DUPLICATING (See PHOTOCOPY)	
REFERENCE SERVICE	Cost not reimbursable.
REPORT TIME	Interpreted as time spent to complete extramural forms for CO, reimbursable.
ROOMS (See also HOTEL/MOTEL ROOMS)	Cost of rental of rooms for conferences, seminars, etc. for extramural activities is reimbursable. The same is true for rental or rooms for meetings organized by local group in conjunction with the ExMC.
STAMPS (See POSTAGE)	
STATIONERY	Official KOMRML stationery is available from CO.
SUBSCRIPTIONS	Cost of subscriptions to magazines or journals is not reimbursable.

TELEPHONE CALLS (See also CENTRAL OFFICE CONTACTS)	Charges for telephone calls for official extramural contacts are reimbursable. Enter the number of minutes on report form #19. Charges (in dollars) for telephone calls when travelling should be entered on the official travel expense report.
TELEPHONE INSTALLATION	Cost of telephone installation for MEDLINE demonstration is reimbursable. Enter cost on report form #19 under supplies.
TRAVEL OUTSIDE REGION	Travel expense for contacts outside KOMRML are reimbursable provided an invitation in writing has been received, the KOMRML Director is notified of the travel, and a written report is sent to CO following the contact.
TRAVEL TO MEETINGS (See also CENTRAL OFFICE CONTACTS; HOTEL/MOTEL ROOMS; MEALS; MEETINGS; ROOMS)	Travel expense to official meetings of the KOMRML are reimbursable.
VISIT (See CONTACT)	

Appendix 14. Institutional Annual Report

KENTUCKY-OHIO-MICHIGAN REGIONAL MEDICAL LIBRARY NETWORK

Extramural Services

INSTITUTIONAL ANNUAL REPORT

PL _____

EXM Coord. _____

Period Covered _____

Base Line Year _____

Report Time (in min.) _____

NAME OF INSTITUTION _____

_____
Street City State Zip

Date Previously Visited _____

ADMINISTRATION

1. The Library Annual Report Includes:

   ____statistics & narrative ____narrative only ____statistics only

   ____no report submitted

2. The Library Collection Is Supported By:

   ____irregularly received funds ____formal budget ____no funds are available for support

3. The Library Has A Policy And Procedures Manual? ____yes ____no

PERSONNEL

1. The Person In Charge Of The Library Is: ____full time ____part time ____ volunteer

   Is This An Increase Of The FTE? ____yes ____no

2. The Person In Charge Of The Library Has:

   ____high school diploma ____library technical degree ____other 2-yr degree

   ____4-yr degree ____MLS ____other degree(s)

3. The Person In Charge Of The Library Reports To: _____

PROFESSIONAL & NETWORK DEVELOPMENT

1. Is There A Local Health Science Library Group In The Area? ____yes ____no

2. Does Any Library Personnel OR The Institution Hold Membership In The Local Group?

   ____yes ____no

3. ____ Number Of Times The Institution Has Been Represented At Local Group Meetings This Year

4. Does Any Library Personnel Have Released Time To Attend Local Group Meetings?

   ____yes ____no

PROFESSIONAL & NETWORK DEVELOPMENT (Cont'd)

5. Does The Person In Charge Of The Library Have Released Time To Attend Workshops, CE, etc.?

_____yes _____no

6. Does The Person In Charge Of The Library Receive Reimbursement For Expenses To Attend Workshops, CE, etc.?

_____yes _____no

USER SERVICES

1. INTERLIBRARY LOAN

_____Number Of Requests Sent To Your KOM Resource Library

_____Number Of Requests Sent To Other Libraries

Is There A Union List Of Serials For The Area? _____yes _____no

Does The Library Own The Area Union List Of Serials? _____yes _____no

Are The Library's Holdings In The Area Union List Of Serials? _____yes _____no

2. ON-LINE BIBLIOGRAPHIC REQUESTS

_____Number Of Requests In-House

_____Number Of Requests Sent To Your KOM Resource Library

_____Number Of Requests Sent To Other Libraries

Is The Institution A Member Of An On-Line Services Consortium? _____yes _____no

3. NON-PRINT MEDIA

Does The Library Provide Access To The Institution's Non-Print Media? _____yes _____no

TECHNICAL SERVICES

1. _____Number Of Journals Currently Subscribed To

2. Does The Library Have Basic Reference Tools? _____yes _____no

3. Does The Library Have Adequate Space For Library Materials, Staff, And Activities?

_____yes _____no

4. Are The Library Materials Cataloged? _____yes _____no

COMMENTS

KENTUCKY - OHIO - MICHIGAN REGIONAL MEDICAL LIBRARY PROGRAM

Extramural Services

PL _____

E. Coord _____

Period Covered _____

Base Line Year _____

Report Time (in min.) _____

LOCAL GROUP YEARLY REPORT

NAME OF LOCAL GROUP _____

_____

Contact Person Institutional Affiliation

_____ Date Founded _____ Total Members _____ Average Attendance at Membership Meet.

THE ABOVE LOCAL GROUP HAS OR SUPPORTS THE FOLLOWING:

YES	NO	
___	___	Membership dues
___	___	Constitution and/or By-Laws
___	___	Regularly Scheduled Activities (e.g. Workshops, Seminars)
___	___	Special Projects (e.g. Union Lists)
___	___	Educational Programs At Its Membership Meetings
___	___	Committees To Solve Problems Or Plan For The Future
___	___	Representative To Other Group Meetings
___	___	Representation On The Local Participating Library Advisory Committee (PLAC)
___	___	A Newsletter
___	___	Cooperation With Other Groups For Programs, Meetings, Conferences

_____

_____ Number Of Meetings Attended By The Extramural Coordinator

COMMENTS _____

_____

KENTUCKY - OHIO - MICHIGAN REGIONAL MEDICAL LIBRARY PROGRAM

Extramural Services

QUARTERLY ACTIVITY REPORT

PL _____

E. Coord. _____

Period Covered _____

Report Time (in min.) _____

	TOTAL NUMBER	ACTIVITY
SUMMARY OF COORDINATOR'S ACTIVITY	_____	Contacts (Includes All Types)
	_____	Institutional Visits
	_____	Group Contact
	_____	Individual Contacts
	_____	Requests for Technical and/or Resource Assistance (Use TS & RS categories under NATURE OF CONTACT in Extramural Log as Guide)
	_____	Requests for Grant Information
	_____	Grant Applications Mailed
Summary of Cooperative Efforts Among Coordinators	_____	Meetings
	_____	Workshops
	_____	Demonstrations/Exhibits
	_____	Projects

COMMENTS

_____

_____

_____